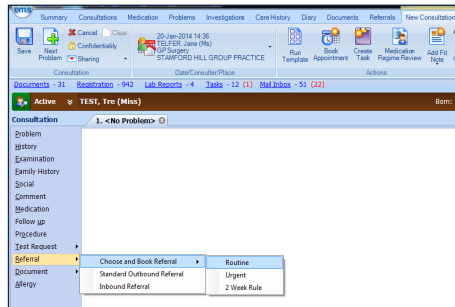



## 1. Creating NHS e-referrals in EMIS

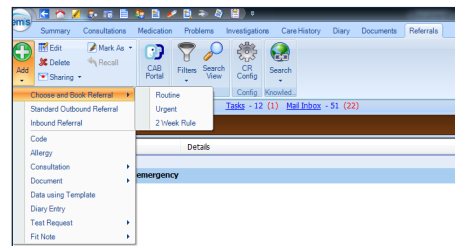
Within EMIS Web, ensure the patient is selected, you are logged on using your smartcard and that the PDS is synchronised (blue).

If using DXS, create the MSK referral letter in advance and from the referral letter confirm key details such as referring clinician, urgency and reason for referral eg Physio/Orthopaedics and Knee.

From within a **Consultation**, select **Referral** on the left-hand pane, point to **Choose and Book Referral** and then select an appropriate **Priority**.



Or from **Care Record** select the **Referrals** tab, on the ribbon, click , point to **Choose and Book Referral** and then select an appropriate **Priority**.



Select the **Referring Clinician** field and Click on **OK**.

**Note:** If you are a GP creating a referral, this field is not displayed.

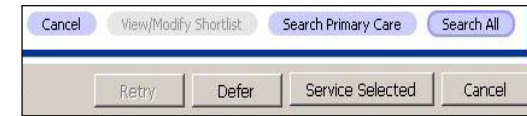
Choose and Book is launched within EMIS Web, displaying the **Service Search Criteria** screen. The **Appointment Type** and **Priority** fields are completed with the information you entered in EMIS Web.

If you are referring on behalf of a GP, you will need to re-select a **Referring Clinician** on this screen. Select Speciality eg Physio/Orthopaedics  
Select Clinic Type eg MSK or Knee

At this stage, a Unique Booking Reference Number (UBRN) is created within EMIS Web **but not yet completed** in Choose and Book. It is displayed at the bottom left of the screen. You **must** complete the

whole referral process to ensure the referral is created correctly. If no UBRN is displayed on this screen, refer to the EMIS Web User Guide on how to resolve this.

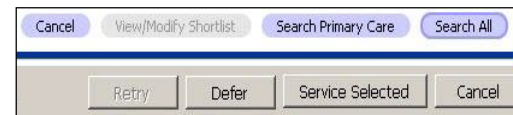
At the bottom right of the screen, two sets of buttons are displayed:



In the top set of buttons (eg C&B//eReferrals)

- Select **Search Primary Care**
- On the following screen, select the provider eg SMSK Partnership
- Select **Appointment Search** which will display all available appointments. This will not be a live appointment but will allow a telephone assessment booking to be made for the patient.
- Click the first available appointment in the list (don't worry about the time as the system generates these automatically and the triage assessment team from SMSKPE will contact the patient once the booking is made.
- Click **Book**
- Select **Submit**

The referral will be sent through but there is still some work to do in EMIS to send the referral letter and any results that need to go with the appointment.

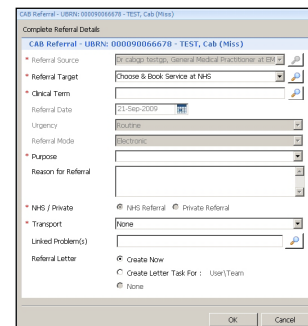


In the bottom set of buttons (eg EMIS web)

You will then have a drop down option that says **'I have Selected a Service'**

- Click on **'I have Selected a Service'**
- Click **OK**

You are returned to EMIS Web, and the Choose and Book **Complete Referral Details** screen is displayed:



In this screen, there are a number of mandatory fields (marked with a red asterisk \*). Depending on local processes the only mandatory field that needs to be completed is the clinical term to describe referral.

The default settings should be fine but if required make sure Confirm Booking is added.

Select **Create Now** and Click **OK**.

If you select **Create Letter Task** then a task will be sent to EMIS Referral workflow and can be managed by secretarial staff.

The next screen has three main sections.

CAB Letter  
Referral Letter  
Clinical Content

**CAB letter** – DO not check the Add referral box but DO add some text eg physio referral  
**Referral letter** – you can use this if you don't use the DXS referral form, and have your own referral template. Make sure the check box on the CAB letter is checked and then select your template.

**Clinical Content** – this can be used to add your DXS referral letter prepared earlier or to add more attachments (e.g. test results) select **Clinical Content** and then click **Attachments**.

- Select the document/s required eg select MSK referral attachment
- From the Investigations section add additional supporting documents
- Depending on local processes for checking the referral before it is sent, you can save as **Draft** or select **Authorise and Send**.

## 2. Add or change existing supporting information

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You can amend, or add more supporting information to a referral but it is important to note that when attaching a referral letter via EMIS Web, you **must** make any changes, for example, adding test results, **via EMIS Web**.

Do the following:

- ◆ On the **Patient's Care Record Referrals** tab, select the required referral and on the ribbon, click **Edit**.
- ◆ The **Outbound Referral Details** screen is displayed. At the bottom of the screen, click **Edit Now** and then click **OK**.
- ◆ The Edit Referral message screen is displayed, click **Yes** to proceed with editing.
- ◆ On the **Generate Choose and Book Letter** screen you can:
  - ◆ Edit an existing document, select **Referral Letter** and edit as required.
  - ◆ Add more attachments (e.g. test results), select **Clinical Content** and then click **Attachments**.

Select the document/s required and click **Authorise and Send**.

## 3. Check your Worklists

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To view a worklist, log into e-RS <https://nww.ebs.ncrs.nhs.uk> and click the second tab **Worklists**:

There are four worklists:

1. Referrer Action required
2. Awaiting Booking/Acceptance
3. Advice and Guidance requests
4. Outstanding Referral Letters

In general worklists should be checked at least once a week and in some cases more often to make sure the referral has gone through successfully. Select the worklist you want to check and click on the button on the right hand side of the screen **Load**

Successfully referred patients will appear on the Awaiting Booking / Acceptance worklist with a dummy appointment in the appointment column. To begin with, we would recommend monitoring this work list after every referral.

Referrals without letters attached will be on the Outstanding Referral Letters worklist. This list should be monitored daily.

Misdirected referrals which have been sent back to practice for redirection, will be on the Referrer Action required work list. Any rejected referrals on this work list need to be actioned by the practice, so we would recommend that this list is monitored daily. Any questions on referrals on this work list need to be directed to the provider.

## 4. Patient password management

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### Patient appointment management

When a patient is issued with a Unique Booking Reference Number (UBRN) they can manage their appointment themselves. Go to <https://www.ebs.ncrs.nhs.uk> On this screen patients can book, change or cancel their appointment online by entering their details and logging in. Patients will need their reference number and their password (shown on their appointment letter. For security reasons, patients are given three attempts to enter the correct details. If patients are unable to log in, they may contact their GP practice.

If patients need assistance in choosing a clinic, booking, changing or cancelling your appointment patients can use the online option or call the e-Referral Service Appointments Line.

Phone: Phone: 0345 60 888 88 or Text phone: 0345 85 022 50

### How to check Patient password

When a patient has been issued with a eReferrals booking they are issued with a password.

If they lose their password you can look it up. Go to <https://nww.ebs.ncrs.nhs.uk>

- Look up patient using NHS number or UBRN
- Click on drop down option and select 'View Details'
- Then click on 'Update Person' tab at the bottom of the screen
- Scroll down to view patient password. The password is unique to the patient not the booking.

### How to Remove Patient Lock

- Locate the patient referral within NHS e-Referral Service.
- Click on the UBRN
- Select "Remove Patient Lock" from the drop-down list
- Click OK to remove the lock
- The referral can now be actioned either by the patient or the practice.